State of Wisconsin

Department of Administration

Manage Delegations Job Aid

Version 1.0

Version History

Version	Date	Editor	Description
1.0	10/1/19	Matt Olsen	Initial release

Role: *Agency Time & Labor Specialist*

ADD DELEGATION REQUESTS

1. Navigate to Add Delegation Request page:
   a. **Navigation:** Workforce Administrator Homepage > Payroll Dashboard > Time & Labor Tile > Approvals Folder > Add Delegation Request
   b. Enter at least one search criteria and select delegating supervisor (delegator)
2. Enter From Date equal to or greater than current date. This is the date from which delegation will be active
3. Enter To Date greater than From Date. This is the date in which delegation will end

From Date	To Date	Trans Type	Transaction Name		Proxy		Name			
				🔍		🔍			+	−

4. Select Transaction Name for transaction being delegated. Use the magnifying glass next to Transaction Name to choose from the following options:

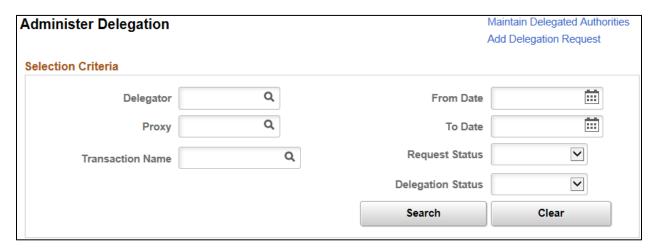| Transaction	Transaction Name	Transaction Description
Manage Approve Payable Time	TL_SRCH_APPRV_GRP	Delegate the approval of payable time.
Manager Absence Balance	GP_ABS_MGRSS_BAL	Delegate the initiation of manager absence balance inquiries.
Manager Absence History	GP_ABS_MGRSS_HIST	Delegate the initiation of manager absence history inquiries.
Manager Absence Request	GP_ABS_MGRSS_REQ	Delegate the initiation of manager absence requests.

5. Enter Empl ID of proxy to whom delegator will delegate the specified transaction
6. Click the plus sign (+) at the far right to add a row if more than one transaction is being created
7. Once all delegation transaction requests are entered, click Save

NOTE: The proxy will need to accept the delegation request by clicking the link in the automated email they receive in order to make the delegation active.

ADMINISTER DELEGATION REQUESTS

1. Navigate to Administer Delegation page:
   a. **Navigation:** Workforce Administrator Homepage > Payroll Dashboard > Time & Labor Tile > Approvals Folder > Administer Delegation
2. Enter any of the following search criteria:
   a. Delegator: Enter Empl ID of delegator whose delegation requests are to be reviewed
   b. Proxy: Enter Empl ID of proxy whose delegation requests are to be reviewed
   c. Transaction Name: Enter transaction requests to be reviewed. Use the magnifying glass if transaction name is unknown
   d. From Date and To Date: Specify date range for which to review delegation request. Leave To Date blank to review delegation requests for a specific date
   e. Request Status: Select status of requests to be reviewed

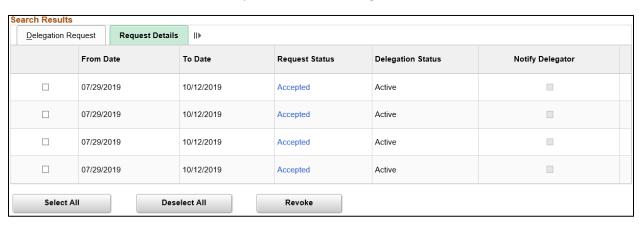f.   Delegation Status: Select the delegation status of the requests to be reviewed

2.   Once all search criteria are entered, click Search

Review Delegation Request

1.   Under the search results Delegation Request tab, review Description, Delegation, Delegator and delegator Name, and Proxy and proxy Name

2.   Click on the Request Details tab to review additional information about the delegation requests: From Date and To Date, Request Status and Delegation Status

	From Date	To Date	Request Status	Delegation Status	Notify Delegator
☐	07/29/2019	10/12/2019	Accepted	Active	☐
☐	07/29/2019	10/12/2019	Accepted	Active	☐
☐	07/29/2019	10/12/2019	Accepted	Active	☐
☐	07/29/2019	10/12/2019	Accepted	Active	☐

Select All   Deselect All   Revoke

3. Click on the Request Status to review further details

Request and Delegation Statuses:

Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to Submitted and delegation status to Inactive.
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to Accepted. The delegation status becomes Active only when the following two conditions occur: 1. The proxy accepts the delegation request 2. The system date is greater than or equal to the From Date and less than or equal to the To Date of the delegation period
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future dated, the delegation status remains *Inactive* until the system date is greater than or equal to the From Date.
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to *Rejected.* The delegation status remains *Inactive.*
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to *Ended* and changes the delegation status to *Inactive.* This change occurs when the system date is greater than the To Date of the delegation authority period.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to *Revoked* and changes the delegation status to *Inactive. The system reassigns all pending transactions from the proxy to the delegator.*

Revoke Delegation Request

1. From the search results, select the checkbox next to each request to be revoked. When the appropriate delegation requests are selected, click **Revoke**

NOTE: The system will send a notification to the proxy affected by the change and automatically reassign all pending transactions back to the delegator.